



***HARRIS COUNTY  
APPRAISAL DISTRICT  
HARRIS COUNTY  
HOUSTON, TEXAS***

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**Division  
2019 Budget  
Summaries**

**July 2018**

***DIVISION BUDGET SUMMARIES***

***PROPOSED 2019 BUDGET***

for the

**HARRIS COUNTY APPRAISAL DISTRICT**

Board of Directors Budget Workshop  
July 18, 2018

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# Board of Directors & Appraisal Review Board - 1001

## 2019 Budget Briefing

### Divisions for budget items related to the Board of Directors and the Appraisal Review Board

#### Board of Directors

- Professional services for legal costs
- Post-ARB appeal costs
- Taxpayer Liaison Officer (.5 FTE)

#### Appraisal Review Board

- ARB per diem & associated taxes
- ARB Training

### 2019 Division Budget

Salaries, Wages & Related	\$2,811,000
Employee Benefits	\$266,342
Office & Field Operations	\$58,800
Computer Operations	\$0
Professional Services	\$11,593,967
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$14,730,109</b>

### Proposed Changes

Share of office & field operations increase	\$23,000
Share of arbitration fees & services increase	\$300,000



2017 Performance Measures	
Monthly board of directors' meetings	12
Post-ARB lawsuits	4,594
Post-ARB arbitrations	7,344
Total protests	393,753
ARB protest hearings	134,909
Cost per hearing	\$22.16
Division cost per parcel	\$8.14

# Office of the Chief Appraiser - 5001

## 2019 Budget Briefing

Roland Altinger, Chief Appraiser  
 Jason Cunningham, Deputy Chief Appraiser

**Responsible for administration of the appraisal district and support of the board of directors**

- Direct the 2<sup>nd</sup> largest assessment entity in the United States
- 661 employees
- Responsibly oversee and manage \$88.1 million budget
- Annual reappraisal of 1.8 million parcels of property covering 1,778 square miles of land
- Annual caseload approximating 393,000 protests
- Produce timely and correct appraisal roll for over 500 taxing entities
- 7 Total Staff

**2019 Division Budget**

Salaries, Wages & Related	\$873,198
Employee Benefits	\$253,746
Office & Field Operations	\$60,000
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,186,944</b>

**Proposed Changes**

None



**2017 Performance Measures**

Certify timely
Timely present budget to Board of Directors
Implement and continue development of management training program
Continue development on succession planning initiatives
Prepare for 2018 Methods and Assistance Program Report (MAP)
Finalize implementation of bills from 85 <sup>th</sup> legislative session
Passed 2017 Property Value Study (PVS)
Prepare for 86 <sup>th</sup> legislative session
Maintain relationships with over 500 jurisdictional representatives
Projected 2017 Population of Harris County: 6,928,233
Division cost per parcel: \$0.66

# Professional Education & Development Division - 5002

## 2019 Budget Briefing

Theresa Delbasty, Manager

**Responsible for education and professional development for all district employees.**

- Registration, certification, and renewal of appraisal licenses, professional designations, and membership groups
- Managing and delivering top-class, in-house professional and technical education programs
- Prepare and coordinate HCAD annual education schedule and materials
- Enroll students in core appraisal courses – update in Halogen software
- Coordinate IAAO appraisal courses, workshops, and webinars
- Schedule Level III & IV exams
- Report TDLR core appraisal course results & continuing education credits
- Score exams and prepare certificates
- Manage career ladder program
- Coordinate CDP completion payments
- Update HCAD Appraiser Career Guidebook
- Creation of manuals and documentation, on-line learning and instructor support
- 4 Total Staff

**2019 Division Budget**

Salaries, Wages & Related	\$263,880
Employee Benefits	\$103,569
Office & Field Operations	\$23,325
Computer Operations	\$0
Professional Services	\$19,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Division Total</b>	<b>\$409,774</b>

**Proposed Changes**

Share of office & field operations increase	\$1,600
Share of professional services increase	\$4,000



**2017 Performance Measures**

TDLR Registrations	325
PSI Online RPA Exam Registrations	73
Core Curriculum Appraisal Courses held	46
CTA Courses held	3
Students enrolled in Appraisal Courses	1,800
Appraisal Course exams scored	1,700
Course Certificates of Completion prepared & distributed	1,800
Instructor/Course Evaluations	1,620
Prepared and processed PAF's for Career Ladder Promotions (24 for Appraiser III, 3 for Appraiser II and 12 for Appraiser I 3% Increase for meeting 1 year service and TDLR requirements)	68
Online reporting to TDLR of core course completions & CE reporting	1,800
Division cost per parcel	\$0.23

# Communications Division - 5003

## 2019 Budget Briefing

Jack Barnett, Chief Communications Officer

### Responsible for

- Internal and external communications, including office of the assistant taxpayer liaison
- Community relations outreach and Speakers Bureau
- Annual report
- Photography, newsletters, new releases, and media responses
- Receive, research, and respond to property owner calls and emails
- Script and produce videos for public education and employee training
- Revise forms and letters to comply with Tax Code changes
- Social media and website updates Respond to media questions and interview requests
- 8 Total Staff

### 2019 Division Budget

Salaries, Wages & Related	\$504,581
Employee Benefits	\$203,610
Office & Field Operations	\$13,477
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$721,668</b>

### Proposed Changes

Share of wages increase	\$63,594
Share of employee benefits increase	\$31,219



### 2017 Performance Measures

Property owner email responses	30,068
Property owner letter responses	40
Property owner phone call responses	1,362
Videos updated and produced	11
Total video loads	4,730
Form updates	73
Community Relations/Presentations	64
News media interviews	23
Newsletters	6
News releases	17
Web site updates	43
Division cost per parcel	\$0.40



# Legal Services Division - 5004

## 2019 Budget Briefing

L. Susan Herrera, Chief Legal Officer

### Responsible for legal services

- Provide legal representation at trials, hearings, mediations, appeals, depositions, settlement conferences, ARB hearings, and SOAH
- Defend between 2,000 and 3,500 lawsuits annually
- Work directly with review appraisal division and outside counsel to resolve lawsuits
- Provide in-house legal services to the district including analyze & negotiate contracts
- Respond to open records requests
- Track, analyze, and implement relevant legislative bills
- Provide training on legal issues to HCAD employees
- 12 Total Positions
  - 7 Lawyers
  - 5 Support Staff

### 2019 Division Budget

Salaries, Wages & Related	\$970,016
Employee Benefits	\$341,060
Office & Field Operations	\$33,165
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,344,241</b>

### Proposed Changes:

Share of wages decrease	(\$50,479)
Share of employee benefits decrease	(\$13,867)



### 2017 Performance Measures

#### Lawsuits Pending as of 1/1/2017

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
2,624	5,365	\$10,797,082,316

#### Added During 2017

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
2,532	4,269	\$10,288,988,274

#### Pending as of 12/31/2017

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
3,149	6,255	\$13,447,740,278

#### Total Resolved During 2017

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
2,550	5,166	\$10,672,425,109

#### Non-Suits/Dismissals in 2017

<u>Cases</u>	<u>Accounts</u>	<u>Value</u>
107	189	\$271,374,868

#### Trials:

<u>Cases</u>	<u>Accounts</u>	<u>Reduction</u>
4	5	\$4,655,634

Division cost per parcel \$.74

## Human Resources Division - 5005

### 2019 Budget Briefing

Sally Vardy, Chief Human Resources Officer

**Responsible for strategic and functional responsibilities for all HR disciplines:**

- Strategic planning
- Employer brand management
- Recruitment and selection
- Onboarding
- Organizational development
- Leadership development & succession plans
- Coaching
- Performance management
- Training & development
- Talent & career management
- Employee engagement & retention
- Internal communication
- Team building & development
- Benefits plans & wellness programs
- Compensation & market analysis
- Policy development, interpretation & implementation
- Employment law compliance & risk management
- Employee relations & conflict management
- HRIS (human resources information systems)
- 661 – Staff district wide(requested)
- 9 HR Staff

**2019 Division Budget**

Salaries, Wages & Related	\$739,873
Employee Benefits	\$259,217
Office & Field Operations	\$62,591
Computer Operations	\$0
Professional Services	\$38,725
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$1,100,406</b>

**Proposed Changes:**

Share of wages increase	\$121,535
Share of employee benefits increase	\$42,274



### *Human Resources*

<b>2017 Performance Measures</b>	
Job postings	250
Applications received	3,500
Applicant skills assessment	300
Interviews conducted	900
Criminal & employment verification	440
New hires (FTE)	62
Onboarding (FTE, ARB, Temps)	190
Halogen processing	985
Kronos processing	1,400
Benefits	3,800
Wellness training	310
FMLA leaves	65
Compensation Analysis & Surveys	440
Employee relations	65
Risk management (TWC & EEOC)	16
HR professional development	115
HR sponsored training	14
Administration (badges, directory, VOE's, service awards, meetings, file mgmt.)	3444
Turnover	8.54%
Special projects	605
Job postings	250
Division cost per parcel	\$0.61

# Appraisal Operations Division - 5006

## 2019 Budget Briefing

April Holcomb, Associate Chief Appraiser

### Responsible for

- Using appraisal expertise to deliver credible certified estimates
- Statistical analysis of valuation processes
- Ad hoc queries to provide data and predictive analysis in support of information requests
- Act as liaison between Appraisal and Information Technology to support efficient and effective process enhancements
- Utilize appraisal expertise to evaluate CAMA technologies that promote credible reappraisals
- Conduct ratio studies to validate valuation performance and test cost schedules
- 6 Total Staff:

### 2019 Division Budget

Salaries, Wages & Related	\$532,363
Employee Benefits	\$179,659
Office & Field Operations	\$244,974
Computer Operations	\$0
Professional Services	\$32,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$988,996</b>

### Proposed Changes

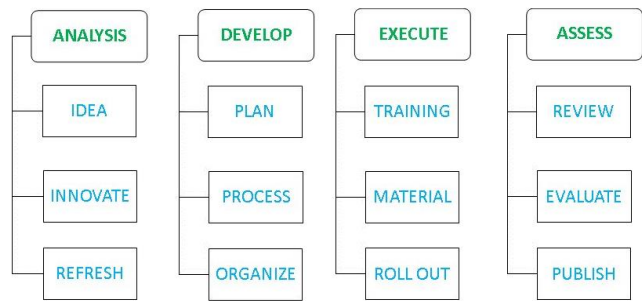
None	\$0

### SQL JOINS

**LEFT JOIN:** SELECT \* FROM Table A LEFT JOIN Table B ON A.Key = B.Key  
**RIGHT JOIN:** SELECT \* FROM Table A RIGHT JOIN Table B ON A.Key = B.Key  
**INNER JOIN:** SELECT \* FROM Table A INNER JOIN Table B ON A.Key = B.Key  
**FULL OUTER JOIN:** SELECT \* FROM Table A FULL OUTER JOIN Table B ON A.Key = B.Key  
**FULL JOIN:** SELECT \* FROM Table A FULL JOIN Table B ON A.Key = B.Key



### STRATEGY & PLANNING



### 2017 Performance Measures

Assist in timely delivery of certified estimates	64
Develop ISD ratio studies:	52
o commercial	78
o residential	
Monitor and reply to iSettle emails	3,041
Division cost per parcel	\$0.55

# Business & Industrial Property Division – 5007

## 2019 Budget Briefing

Hal Long, Associate Chief Appraiser

**Responsible for appraisal of personal property, industrial property, minerals, utilities, and inventory.**

Appraisal of 369,550 total parcels

- 6,069 industrial real property accounts
- 14,622 industrial personal property accounts
- 10,837 mineral and utility accounts
- 157,907 commercial personal property accounts
- 176,567 multi-location parcels
- 3,548 special inventory accounts

Processing

- 115,453 renditions
- 1,037,562 multi-location items
- 335,519 document scanning
- 112,264 document indexing
- 35,855 transportation pool items
- 4,014 exemptions

88 Total Employees

- 62 Appraisers
- 26 Non-appraisal staff

**2019 Division Budget**

Salaries, Wages & Related	\$4,491,043
Employee Benefits	\$2,047,047
Office & Field Operations	\$202,900
Computer Operations	\$0
Professional Services	\$1,558,564
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$8,299,554</b>

**Proposed Changes**

Share of office & field operations increase	\$52,700
Share of professional services increase	\$52,269




Total market value of property valued in 2018:  
\$106,009,138,194

Market value change from 2017:  
\$3,966,652,575 (a change of 3.89%)

2017 Performance Measures	
Properties inspected	20,240
Protests resolved	19,270
Penalty waiver requests reviewed	10,445
New tangible accounts created	17,568
Corrections processed	9,016
Dealer inventory declarations	3,397
Parcels per appraiser	5,960
Division cost per parcel	\$4.59

# Commercial Valuation Division - 5008

## 2019 Budget Briefing

<p>Erika Nettles, Associate Chief Appraiser</p> <p><b>Responsible for appraisal of commercial property, land valuation, and agricultural valuation.</b></p> <ul style="list-style-type: none"> <li>• 106,093 total parcels</li> <li>• 62,228 acres of unimproved commercial land</li> <li>• 232,480 acres of agricultural and specially appraised land</li> <li>• 67,404 improved commercial properties</li> <li>• 38,689 vacant land parcels</li>   <li>• 77 Total Staff             <ul style="list-style-type: none"> <li>○ 62 Appraisers</li> <li>○ 15 Non-appraisal staff</li> </ul> </li> </ul>	 <p>Total market value of property both at noticed date and unnoticed date in 2018: \$177,864,779,140</p> <p>Total market value as of certification in 2017: \$157,344,903,852</p> <p>Market value change from 2017: Increase of \$20,519,875,288 or 9.3%</p>																																								
<p><b>2019 Division Budget</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">Salaries, Wages &amp; Related</td> <td style="text-align: right;">\$4,240,375</td> </tr> <tr> <td>Employee Benefits</td> <td style="text-align: right;">\$1,851,843</td> </tr> <tr> <td>Office &amp; Field Operations</td> <td style="text-align: right;">\$213,171</td> </tr> <tr> <td>Computer Operations</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Professional Services</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Rent, Utilities &amp; Maintenance</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Capital Expenditures</td> <td style="text-align: right;">0</td> </tr> <tr> <td><b>Total</b></td> <td style="text-align: right;"><b>\$6,305,389</b></td> </tr> </table>	Salaries, Wages & Related	\$4,240,375	Employee Benefits	\$1,851,843	Office & Field Operations	\$213,171	Computer Operations	0	Professional Services	0	Rent, Utilities & Maintenance	0	Capital Expenditures	0	<b>Total</b>	<b>\$6,305,389</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: left;">2017 Performance Measures</th> </tr> </thead> <tbody> <tr> <td>Total properties inspected</td> <td style="text-align: right;">17,407</td> </tr> <tr> <td>Properties revalued</td> <td style="text-align: right;">77,458</td> </tr> <tr> <td>New construction added</td> <td style="text-align: right;">2,418</td> </tr> <tr> <td>Miles driven</td> <td style="text-align: right;">82,795</td> </tr> <tr> <td>Protests resolved</td> <td style="text-align: right;">59,098</td> </tr> <tr> <td>Sales processing &amp; verification</td> <td style="text-align: right;">5,900</td> </tr> <tr> <td>New subdivision files</td> <td style="text-align: right;">561</td> </tr> <tr> <td>Agriculture Applications</td> <td style="text-align: right;">2,024</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td>Parcels per appraiser</td> <td style="text-align: right;">1,720</td> </tr> <tr> <td>Division cost per parcel</td> <td style="text-align: right;">\$3.49</td> </tr> </tbody> </table>	2017 Performance Measures		Total properties inspected	17,407	Properties revalued	77,458	New construction added	2,418	Miles driven	82,795	Protests resolved	59,098	Sales processing & verification	5,900	New subdivision files	561	Agriculture Applications	2,024			Parcels per appraiser	1,720	Division cost per parcel	\$3.49
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# Residential Property Division - 5009

## 2019 Budget Briefing

Steve Atchison, Associate Chief Appraiser

**Responsible for appraisal of all single-family residential properties in Harris County.**

- 1,159,805 improved residential properties
- 107,006 vacant residential properties
- Area of responsibility includes 237,620 improved acres and 32,090 vacant acres
  
- 149 Total Employees
  - 137 Appraisers
  - 12 Non-appraisal staff

### 2019 Division Budget

Salaries, Wages & Related	\$7,630,767
Employee Benefits	\$3,482,820
Office & Field Operations	\$717,602
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$11,831,189</b>

### Proposed Changes

None	\$0
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Total market value of property both noticed and unnoticed date in 2018:

265,409,306,316

Total market value of property as of certification in 2017:

\$262,549,918,025

Market value change for 2018:

\$2,859,388,291 (an increase of 1.08%)

### 2017 Performance Measures

Total properties inspected	227,911
New construction inspected	58,551
Sales verified	7,709
Properties updated	722,668
New subdivisions	588
Jurisdiction estimates	187
Protests resolved	309,243
Splits & combos	14,414
Parcels per appraiser	9,246
Division cost per parcel	\$6.54

# Audit Support Services Division - 5010

## 2019 Budget Briefing

Robert Brown, Senior Director

### Responsible for

- Conducting investigations into possible fraud, criminal, civil, and administrative matters
- Internal auditing
- Discovery and detection of omitted properties
- Facilitate the biennial State Comptroller's Methods and Assistance Program (MAP) Review of the CAD (2018)
- Evaluate CAD compliance of Property Tax Code, particularly the implementation of legislative updates
- Analyze and review appraisal data, reports, evidentiary data and procedures for accuracy, efficiency, deficiencies, duplication and fraud
- Process out of business permits & review special projects assigned by OCA
- Collect, compile and preserve material changes that impact each Division for the IAAO CEAA renewal
- 9 Total Staff

### 2019 Division Budget

Salaries, Wages & Related	\$623,017
Employee Benefits	\$238,756
Office & Field Operations	\$60,565
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$922,338</b>

### Proposed Changes

None	0
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### 2017 Performance Measures

Compliance and Operational Reviews	6
Special audit (includes processing 21-day property owner request letters for additional information, reviewing Freeport exemptions, business personal property accounts over 1 million in value and discovering omitted property)	4,089
Dealer inventory administration (motor vehicle, heavy equipment & manufactured housing); and assistance with litigation, petitions, and audits	235
Hearings review	600
Employee disclosure forms research	767
Investigations and administration	19
Hearings held	692
Division cost per parcel	\$0.51

# Review Appraisal Division - 5011

## 2019 Budget Briefing

Adam Bogard, Associate Chief Appraiser

**Responsible for overseeing post ARB property appeals and associated litigation.**

- Work directly with litigation counsel to resolve appeals.
- Appeals resolved through litigation, mediation, arbitration, SOAH, and in-house settlement conferences.
- Staff responsible for reviewing CAMA valuation, analyzing recent sales and contracts, developing reports, court appearances, testifying, and making settlement recommendations.
- Expert knowledge of appraisal methodology, tax code, and reports.
- Values considered are Market Value and Equal & Uniform.
  
- 50 Total Staff
  - 36 Appraisers
  - 6 Research Staff
  - 8 Support Staff



**2019 Division Budget**

Salaries, Wages & Related	\$3,190,278
Employee Benefits	\$1,274,048
Office & Field Operations	\$70,000
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$4,534,326</b>

**Proposed Changes:**

None	\$0
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<b>2017 Performance Measures</b>	
Number of lawsuits filed in 2017	4,637
Number of properties	11,175
Number of lawsuits resolved in 2017	4,064
Number of properties resolved	10,733
Total value in litigation (2017)	\$76 billion
Total value active (all years)	\$43 billion
Number of trials in 2017	6
Number of arbitrations filed in 2017 (511% increase)	6,906
Number of arbitrations resolved (530% increase)	6,611
Number of SOAH cases filed in 201	11
Number of SOAH cases resolved	10
Division cost per parcel	\$2.51



# Geographic Information System (GIS) Division - 8001

## 2019 Budget Briefing

David Dignum, GIS Director

### Responsible for

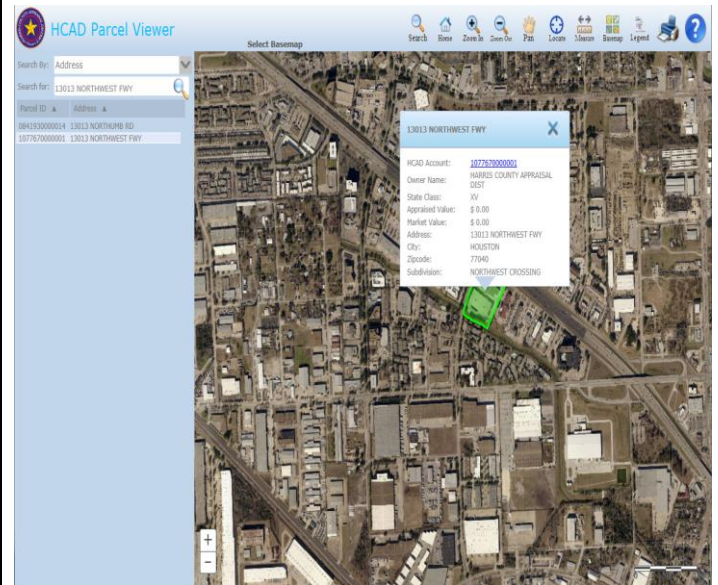
- The administration of the ArcGIS software suite to manage spatial data, create district base maps, generate maps for commercial & residential sales analysis, and mapping special land analysis
- Use ArcGIS Desktop software for spatial data analysis to support HCAD divisions. Use of ArcGIS server software to house the GIS database and provide interactive maps via the intranet to HCAD divisions and via the internet to the public and jurisdictions
- Providing other county governments maps and spatial data to assist in various projects
- Maintaining authoritative records about the status and change of parcels
- Provide a strong framework for managing these types of records with full transaction support
- Creating GIS-based maps and visualizations to assist in understanding situations and in storytelling
- Maintaining maps by split outs, combinations, subdivisions, annexations and de-annexations
- Acquire annual aerial ortho and oblique imagery for district use
- 17 Total Staff

### 2019 Division Budget

Salaries, Wages & Related	\$1,166,041
Employee Benefits	\$447,677
Office & Field Operations	\$82,175
Computer Operations	\$0
Professional Services	\$1,509,600
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$3,205,493</b>

### Proposed Changes

Share of office & field operations increase	\$13,700
Share of professional services increase	\$50,500



### 2017 Performance Measures

Maintenance files	2,007
Create new subdivisions	871
Facet maps	1,602
Division cost per parcel	\$1.77

# ARB Operations Division - 8002

## 2019 Budget Briefing

Jeff Morrison, Chief of Hearings

**Responsible for coordination and planning of activities for the informal meetings, formal hearings, and related functions.**

- Manual and batch scheduling of current and prior year value, exemption, and correction hearings
- Staff front hearings counter for receiving hearings
- Staff kiosk stations for informal and formal hearing workflow management
- Staff and support the ARB Executive office
- Monitor queues for wait times and assist with workflow management
- Provide escorts for formal hearings
- Hearing Evidence processing (preparing, scanning, & sorting)
- Staff reschedule call center for property owners and agents
- Sorting and processing of return mail
- Affidavit processing
- Process jurisdiction corrections
- 30 Total Staff

### 2019 Division Budget

Salaries, Wages & Related	\$1,368,296
Employee Benefits	\$665,396
Office & Field Operations	\$20,440
Computer Operations	\$0
Professional Services	\$650
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$2,054,782</b>

### Proposed Changes

None	\$0



### 2017 Performance Measures

2017 protest volume	393,753
Formal hearings scheduled	223,360
Informal meetings scheduled	390,189
Number of panels used	3,012
Hearing evidence: number of boxes scanned, prepped, & quality-controlled	700
Prior year, correction, and exemption hearings scheduled	6,091
Owner reschedules processed	15,911
Prior year correction processing	6,340
Division cost per parcel	\$1.14

# Jurisdiction Communications Division - 8003

## 2019 Budget Briefing

Celeste Kelly, Senior Director

### Responsible for

- Providing technical and clerical support for over 687 active and inactive jurisdictions which contain over 1.8 million parcels
- Provide roll reports to inactive districts and provide information to various member of the tax community
- Schedule assessor meetings during the year to provide information concerning tax office and appraisal district issues
- Providing information relating to questions concerning exemptions, value, corrections, roll layout and other tax assessor issues to the tax offices, members of the tax community and the public
- Provide necessary reports for ISD Appeal of Property Value and non –ISD property value to assessors and auditors and review completed Appeal Reports of Property Value for discrepancies
- 6 Total Staff

### 2019 Division Budget

Salaries, Wages & Related	\$400,168
Employee Benefits	\$156,512
Office & Field Operations	\$9,120
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$565,800</b>
<b>Proposed Changes</b>	
None	\$0



### 2017 Performance Measures

Appraisal rolls	5,624
Mail	7,823
Telephone calls	8,264
Research	10,022
Name and address changes	6,000
Certified summary of appraisal roll	175
Estimates of appraised value	197
Division cost per parcel	\$0.31

## Information & Assistance Division - 8004

### 2019 Budget Briefing

Bonnie Hebert, Senior Director

#### Responsible for

- Maintaining up-to-date ownership records for parcels of real property
- Telephone bank, service counter, and agent services
- Scanning and entry of all protests
- Administration of exemption programs
- Maintaining files of split outs, combinations, subdivisions, annexations and de-annexations
- Receive and process all PIA and HB 201 request
  
- 119 Total Staff:
  - 6 Appraisers
  - 13 Administration
  - 100 Support staff



#### 2019 Division Budget

Salaries, Wages & Related	\$5,327,529
Employee Benefits	\$2,634,797
Office & Field Operations	\$94,910
Computer Operations	\$0
Professional Services	\$372,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$8,429,236</b>

#### Proposed Changes

Share of wages & related decrease	(\$353,347)
Share of office & field operations decrease	(\$31,245)
Share of professional services decrease	(\$447,220)

#### 2017 Performance Measures

Changes to property records- CAMA system	21,394
Receive, prepare & scan mail	603,215
Research returned mail	25,792
Key name changes	209,203
Key confirmation cards	15,504
Telephone contacts	477,367
Walk-in contacts	20,029
Process HB201	261,365
Process open records	5,460
Key & verify protests	393,868
○ Property owner	104,884
○ Agent	156,607
Exemption applications	156,607
Exemption field checks	486
Exemption hearings	607
Key appointment of agents	83,167
Key agent removals	20,776
Process annexations and de-Annexations	8,569
Setup & key new subdivisions	1,461
Division cost per parcel	\$4.66

# Information Technology Division - 8005

## 2019 Budget Briefing

### Responsible for

- Full service information technology support to internal HCAD colleagues, property owners & their agents, tax assessors / collectors, as well as interfacing with state, county and city agencies
- Support over 800 desktop & laptop computers, 700 phones, LAN/WAN, printers/fax devices, network security and the HCAD data center
- Provide Computer Aided Mass Appraisal (CAMA) technology support
- Custom development for internal and external applications including owners, agents, & jurs.hcad.org
- 45 total staff



### 2019 Division Budget

Salaries, Wages & Related	\$3,770,913
Employee Benefits	\$1,302,983
Office & Field Operations	\$1,386,805
Computer Operations	\$2,035,079
Professional Services	\$1,124,000
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$75,000
<b>Total</b>	<b>\$ 9,694,780</b>



### Proposed Changes

Share of office & field operations increase	\$374,053
Share of computer operations increase	\$53,947
Share of professional services increase	\$873,200
Capital expenditures increase	\$25,000

### 2017 Performance Measures

Processed & prepared annual certified & supplementary rolls	Monthly
Uptime & Availability Average	99.66%
Customer Service Average (1-5 Scale with 5 as the highest)	4.36
Help Desk issues resolved	10,190
Tasks (Requests outside of ticket system which include development, networking and systems)	5,151
Value & Scheduling notices and ARB orders printed & processed	1.52m
Division cost per parcel	\$5.36

## Budget & Finance Division - 8006

### 2019 Budget Briefing

Theresa Paul, Chief Financial Officer

**Responsible for budget, finance, payroll, benefits, purchasing, postal services, facilities and security**

- Manage and account for \$88.1 million budget
- Produce \$42.1 million payroll for EEs and ARB
- Contract for \$16.7 million in the employee benefit program
- Purchase \$29.2 million goods & services
- Manage 339,825sf facility
- Provide 24-hour security
- Manage \$24 million in investments
  
- 25 support staff



**2019 Division Budget**

Salaries, Wages & Related	\$1,678,426
Employee Benefits	\$654,073
Office & Field Operations	\$2,089,841
Computer Operations	\$0
Professional Services	\$60,300
Rent, Utilities & Maintenance	\$0
Capital Expenditures	\$0
<b>Total</b>	<b>\$4,482,640</b>

**Proposed Changes**

Share of office & field operations decrease	<\$78,600>
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**2017 Performance Measures**

Taxing unit billing & receipts	5,757
Vendor payments processed	12,510
Employee & ARB payments processed	27,377
Fixed asset records maintained	5,154
Construction projects completed	18
Building repair & HVAC issues	89
Purchase orders processed	2,618
Internal mail processed	110,948
Emergency responses incl. 911	33
Security incidents	80
Division cost per parcel	\$2.48

# Office Services Division - 8007

## 2019 Budget Briefing

Theresa Paul, Chief Financial Officer

**Responsible for funding overhead accounts and activities not assigned to the operating divisions:**

- Career development, career ladder & salary adjustment programs
- Workers' compensation insurance
- General liability and, property insurance
- Office equipment & maintenance
- 339,825 SF building & records center
- Utilities, operation & maintenance of facilities
- 24-hour security for building compound and records center

**2019 Division Budget**

Salaries, Wages & Related	\$1,520,000
Employee Benefits	\$366,153
Office & Field Operations	\$542,550
Computer Operations	\$0
Professional Services	\$0
Rent, Utilities & Maintenance	\$4,858,163
Capital Expenditures	\$0
<b>Total</b>	<b>\$7,286,866</b>

**Proposed Changes**

Share of rent, utilities & maintenance increase	\$172,109
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**2017 Performance Measures**

Manage, operate & maintain facilities	339,825 SF
Cost PSF for note & leasing	\$7.92
Cost PSF for facility maintenance & construction	\$4.47
Cost PSF for utilities	\$1.48
Cost PSF for insurance	\$0.42
<b>Division cost per parcel</b>	<b>\$4.03</b>

2019 BUDGET WITH COMPARISONS  
2018 BUDGET & 2017 ACTUAL

Account Number	Account Name	2017 ACTUAL	2018 BUDGET	2019 BUDGET
	Number of Positions	650	661	661
	Part-time & Seasonal FTEs	15	21.8	13
<u>SALARIES, WAGES &amp; RELATED</u>				
	Salaries & Wages	\$34,532,752	\$ 37,824,174	\$ 38,590,316
	Allowance for Career Development	\$0	95,000	95,000
	Less Salary Lapse	\$0	(1,890,751)	(1,929,047)
	Allowance for Salary Adjustment	\$0	900,000	900,000
	Reserve for Longevity	\$0	395,939	395,939
	Reserve for COLA	\$0	0	0
	Allowance for Career Ladder	\$0	175,000	175,000
3010	Net Salaries & Wages	\$34,532,752	\$ 37,499,362	\$ 38,227,208
3011	ARB Board Members	2,469,405	2,781,000	2,781,000
3015	Contract & Seasonal Labor	\$0	0	0
3020	Shift Differential	\$297,948	16,000	16,000
3030	Overtime	\$234,819	636,376	644,510
3040	Part-time & Seasonal Wages	\$535,718	710,820	433,046
TOTAL SALARIES, WAGES & RELATED		\$38,070,642	\$ 41,643,558	\$ 42,101,764
<u>EMPLOYEE BENEFITS &amp; RELATED</u>				
3501	Group Health Insurance	7,339,801	8,542,764	9,042,480
3503	Workers' Compensation Insurance	105,000	100,000	100,000
3504	Group Life & LTD Insurance	141,059	100,320	135,842
3505	Group Dental Insurance	226,980	230,822	230,821
3506	Group Vision Insurance	70,200	71,388	71,388
3507	Unemployment Insurance	226,800	229,770	229,770
3520	Retirement	7,409,058	5,993,639	6,109,263
3526	FICA Medicare	534,065	603,834	610,473
3527	Social Security	159,997	216,493	199,271
TOTAL EMPLOYEE BENEFITS & RELATED		\$16,212,960	\$ 16,089,030	\$ 16,729,308
<u>OFFICE &amp; FIELD OPERATIONS</u>				
4001	Office Supplies	113,292	169,108	174,325
4003	Office Equipment Maintenance	391,804	549,882	909,524
4011	Telephone & Communication Service	277,736	271,284	281,284
4020	Copier Leases	89,159	94,000	94,000
4021	Copier Supplies & Maintenance	64,071	89,350	73,350
4030	Mapping Reproduction & Supplies	3,661	3,250	3,250
4040	Public Notice Advertising	2,776	18,000	18,000
4050	Security Services	158,210	174,000	174,000
4060	Field Travel, Vanpool & Other Exp	967,938	1,125,206	1,138,919
4070	Appraisal Supplies	17,001	13,610	13,610
4080	Vehicle Gasoline & Maintenance	40,760	34,000	34,000
4090	Records Storage & Supplies	1,580	1,500	2,205
4092	Records Conversion Services	0	0	0
4097	Employee Recognition Activities	34,382	12,000	35,000
4100	Postage, Mailing, & Handling Svcs.	1,974,786	2,072,000	2,000,000
4200	Professional Registration & Dues	89,685	79,170	79,170
4202	Seminars & Other Tuition	215,150	293,489	314,458
4212	Education Travel & Expenses	111,116	169,625	195,725
4213	Books, Manuals & Publications	274,559	340,596	335,394
4501	Printing, Forms, & Stationery	48,907	60,000	54,400
4530	Paper, Copier & Printer	55,423	69,746	55,797
TOTAL OFFICE & FIELD OPERATIONS		\$4,931,996	\$ 5,639,816	\$ 5,986,411



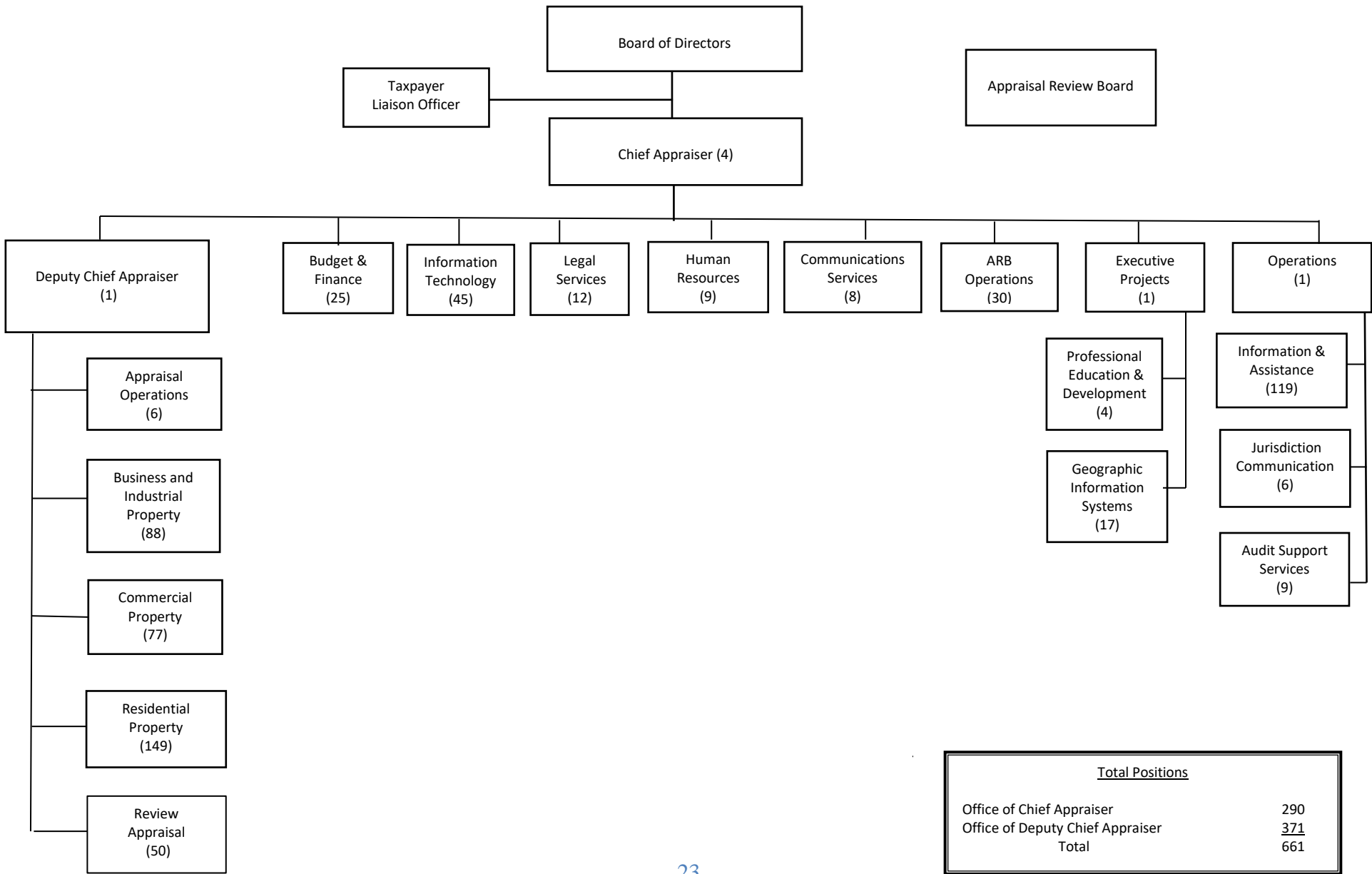
2019 BUDGET WITH COMPARISONS  
2018 BUDGET & 2017 ACTUAL

Account Number	Account Name	2017 ACTUAL	2018 BUDGET	2019 BUDGET
<u>COMPUTER OPERATIONS</u>				
5010	Computer Leasing	0	0	0
5020	CPU & Related Maintenance	89,542	124,000	144,979
5030	Other Computer Maintenance	7,021	11,000	12,623
5040	Computer Supplies	34,169	26,000	26,000
5050	Software Lease & Maintenance	1,320,274	1,789,132	1,833,477
5060	Teleprocessing Lines & Installation	0	31,000	18,000
TOTAL COMPUTER OPERATIONS		\$1,451,006	\$ 1,981,132	\$ 2,035,079
<u>PROFESSIONAL SERVICES</u>				
5510	Financial Auditing	42,997	60,300	60,300
5520	Legal Services	8,087,488	10,983,967	10,983,967
5525	Arbitration Fees & Services	681,050	300,000	600,000
5526	State Office of Admin Hearings	0	5,000	5,000
5530	Appraisal Services	1,474,123	1,506,295	1,558,564
5550	Other Professional Services	1,519,486	1,157,835	1,591,375
5551	Mapping & Records Maintenance	1,076,255	1,459,100	1,509,600
TOTAL PROFESSIONAL SERVICES		\$12,881,399	\$ 15,472,497	\$ 16,308,806
<u>OFFICE SPACE, UTILITIES &amp; RELATED</u>				
6100	Office Space	2,426,713	2,427,904	2,692,620
6150	Utilities	381,308	590,000	502,000
6200	Building & Fixture Maintenance	1,253,005	1,524,650	1,520,043
6400	Casualty & Liability Insurance	129,944	143,500	143,500
TOTAL OFFICE SPACE, UTILITIES & RELATED		\$4,190,970	\$ 4,686,054	\$ 4,858,163
<u>FIXED ASSETS PURCHASES</u>				
6501	Capital Purchases	0	50,000	75,000
TOTAL FIXED ASSETS PURCHASES		\$0	\$ 50,000	\$ 75,000
TOTAL BUDGET		\$77,738,973	\$ 85,562,087	\$ 88,094,531

EXPENDITURE SUMMARY AND METHOD OF FINANCING  
2019 BUDGET

<u>BUDGETED EXPENDITURES</u>	2018 BUDGET	2019 BUDGET	Variance	% Change
<u>Account Groups</u>				
Number of Positions	661.0	661.0	0.0	0.00%
Part-time & Seasonal FTEs	21.8	12.9	(8.9)	-40.80%
Salaries, Wages & Related	41,643,558	42,101,764	458,206	1.10%
Employee Benefits	16,089,030	16,729,308	640,278	3.98%
Office & Field Operations	5,639,816	5,986,411	346,595	6.15%
Computer Operations	1,981,132	2,035,079	53,947	2.72%
Professional Services	15,472,497	16,308,806	836,309	5.41%
Office Space, Utilities & Maint.	4,686,054	4,858,163	172,109	3.67%
Capital Expenditures	50,000	75,000	25,000	50.00%
TOTAL BUDGET	85,562,087	88,094,531	2,532,444	2.96%
 <u>FINANCING METHOD</u>				
Jurisdiction Allocations	85,562,087	88,094,531	2,532,444	2.96%
Interest Income	0	0	0	0.00%
Other Income	0	0	0	0.00%
Application of Restricted Funds	0	0	0	0.00%
Application of Unrestricted Funds				
General Fund	0	0	0	0.00%
Internal Service Fund	0	0	0	0.00%
TOTAL FINANCING METHOD	85,562,087	88,094,531	2,532,444	2.96%

# PLAN OF ORGANIZATION - 2019



<u>Total Positions</u>	
Office of Chief Appraiser	290
Office of Deputy Chief Appraiser	<u>371</u>
Total	661